

e-grants Financial Status Report and Advance Guide

To complete a Financial Status Report follow Steps 1- 14. To complete an Advance skip to page 11 to find instructions.

Step 1: To complete a Financial Status Report (FSR) click on open my tasks

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[SHOW HELP](#)

Welcome John
Authorized Representative
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello John, please choose an option below.

View Available Opportunities
You have 29 My Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)

View My Inbox
You have 25 new messages.
Select the **Open My Inbox** button below to open your system message inbox.

[OPEN MY INBOX](#)

View My Tasks
You have 1 new tasks.
You have 0 tasks that are critical.
Select the **Open My Tasks** button below to view your active tasks.

[OPEN MY TASKS](#)


Step 2: Select the grant that you would like to complete the FSR for

View My Tasks

Sort my tasks by: -- Select -- [GO](#)

Name	Application In Process	5/2/2011	6/3/2011
OJP Grant	00013	Application In Process	
HSEM Application	Anoka County Name A-EMPG-2010-ANOKACO-11928 (2)	Grant Awarded	10/31/2011 11/30/2011
HSEM Application	Anoka County Name A-OSGP-2011-ANOKACO-00001	Application In Process	12/5/2011 2/28/2012
OJP Grant	Anoka County Name A-JABG-2012-ANOKACO-00047	Grant Awarded	1/20/2012 12/31/2012
HSEM Application	Anoka County Name A-UASI-2010-ANOKACO-12721 (1)	Application In Process	11/30/2011
HSEM FSR	Anoka County Name F-EMPG-2010-ANOKACO-00001	Payment Request in Process	12/9/2011

Step 3: Click on View Related Items


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OJP Application Menu

Please select from an option below. For detailed instruction about each option, select the **SHOW HELP** button.


Document Information: [A-JABG-2011-ANOKACO-00017](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	OJP Application	Anoka County	Authorized Representative	Grant Awarded	10/01/2010 - 12/31/2010 12/31/2010 11:59PM

 **View, Edit and Complete Forms**


Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

 **Change the Status**


Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)


 **Access Management Tools**

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

 **Examine Related Items**


Select the **View Related Items** button below to view see related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#) 

Step 4: Click on the link to initiate an Advance/FSR.

Related Documents

Sort search results by: [GO](#)

Document Type	Name	Current Status	Created By	Last Modified By
Advance/Financial Status Report 2011	Initiate a Advance/Financial Status Report 2011 			
2011 JABG Progress Report	R-JABG-2011-1-ANOKACO-00005	Progress Report Approved	John Tonding 12/16/2010 11:45:51 AM	Debi Reynolds 12/16/2010 11:59:44 AM

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Agreement

Please make a selection below to continue.

Are you sure you want to create this advance/financial status report?

The above confirmation message is displayed before the Advance/FSR is created

Step 5: Click on the view forms to view the Advance/FSR forms

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Advance/FSR Menu

Please select from an option below. For detailed instruction about each option, select the [SHOW HELP](#) button.

Document Information: [F-JABG-2011-ANOKACO-00013](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	01/01/2010 - N/A N/A

View, Edit and Complete Forms


Select the **View Forms** button below to view, edit, and complete forms.

←

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

Please note: All users must access the Advance/FSR and select either Expense or Advance



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Advance/FSR Menu - Forms

Please complete all required forms below.


Document Information: [F-JABG-2011-ANOKACO-00013](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	01/01/2010 - N/A N/A

Forms

Status	Page Name	Note	Created By	Last Modified By
	Advance/FSR			

Step 6: To create an expense report click Expense and save the page. After saving the page navigate back to the Forms Menu.



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SAVE CHECK GLOBAL ERRORS

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ADVANCE/FSR

☒ Expense

☐ Advance

Please note: After accessing the Forms Menu you will notice that the Financial Status Report forms are now available in the menu.

Step 7: Select the Financial Status Report/Payment Request Line Items form to begin completing the expense report.

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Advance/FSR Menu - Forms

Please complete all required forms below.

Document Information: [F-JABG-2011-ANOKACO-00013](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	01/01/2010 - N/A N/A

Forms

Status	Page Name	Note	Created By	Last Modified By
	Advance/FSR		Carole Javner 12/21/2010 12:36:56 PM	
FSR				
	Financial Status Report / Payment Request Line Items			
	Financial Status Report / Payment Request Summary			

Step 8: Select the budget item from the Budget Item drop down, fill out the Date, Description and Amount Requested fields. **Save the page.** Use all available rows for the budget items. Rows are dynamically added each time a budget item is filled out.

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FINANCIAL STATUS REPORT / PAYMENT REQUEST LINE ITEMS

Please enter the expenses incurred during the current report period. (Additional blank items will appear upon saving)

Budget Item	Date	Description	Amount Requested
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 9: After completing the payment request line items navigate to the Financial Status Report/Payment Request Summary form by clicking on the Forms Menu link.

Step 10: Complete this form by selecting the Main Contact, select Yes or No for Final Report and enter the Period Dates that the expenses occurred in.

Step 11: Click Save

Document Information: [F-JABG-2011-ANOKACO-00013](#)

[Details](#)

Program Component: Expense

Created By: Javner , Carole on 12/21/2010 12:52:49 PM

You are here: > [Advance/FSR Menu](#) > [Forms Menu](#) > FSR

FINANCIAL STATUS REPORT / PAYMENT REQUEST SUMMARY

GRANT INFORMATION		REPORT INFORMATION	
Grantee:	Anoka County	Main Contact:	<input type="text"/>
Grant #:	A-JABG-2011-ANOKACO-00017	Request #:	1
Award Amount:	\$0.00	Final Report:	<input type="radio"/> Yes <input type="radio"/> No
Term:	10/01/2010 to 12/31/2010	Status:	Payment Request in Process
		Current Report Period:	<input type="text"/> to <input type="text"/>

Comments to the Review Team from the Grantee:

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BUDGET ITEMS	TOTAL		EXPEND THRU		REMAINING		CURRENT PERIOD EXPENSES	
	Award	Match	Award	Match	Award	Match	Award	Match
Personnel	\$9,500.00	\$200.00	\$0.00	\$0.00	\$9,500.00	\$200.00	\$4,500.00	\$0.00
Equipment Purchases	\$100.00	\$30.00	\$0.00	\$0.00	\$100.00	\$30.00	\$25.00	\$0.00
Training	\$5,000.00	\$3,000.00	\$0.00	\$0.00	\$5,000.00	\$3,000.00	\$2,000.00	\$0.00
TOTALS	\$14,600.00	\$3,230.00	\$0.00	\$0.00	\$14,600.00	\$3,230.00	\$6,525.00	\$0.00

Advance Remaining to Spend Down \$0.00 Minus Advance Spend Down

AWARD REMAINING \$0.00 AMOUNT TO BE PAID \$6,525.00

Step 12: Navigate to the Advance/FSR Menu

Document Information: [F-JABG-2011-ANOKACO-00013](#)

[Details](#)

Program Component: Expense

Created By: Javner , Carole on 12/21/2010 12:52:49 PM

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Step 13: Click the View Status Options button

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Advance/FSR Menu

Please select from an option below. For detailed instruction about each option, select the **SHOW HELP** button.

Document Information: [F-JABG-2011-ANOKACO-00013](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	01/01/2010 - N/A N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.


[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Step 14: Click **Apply Status to Payment Request Submitted** to submit your payment request

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Advance/FSR Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [F-JABG-2011-ANOKACO-00018](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Authorized Representative	Payment Request in Process	N/A - N/A N/A

Possible Statuses

PAYMENT REQUEST SUBMITTED

[APPLY STATUS](#)

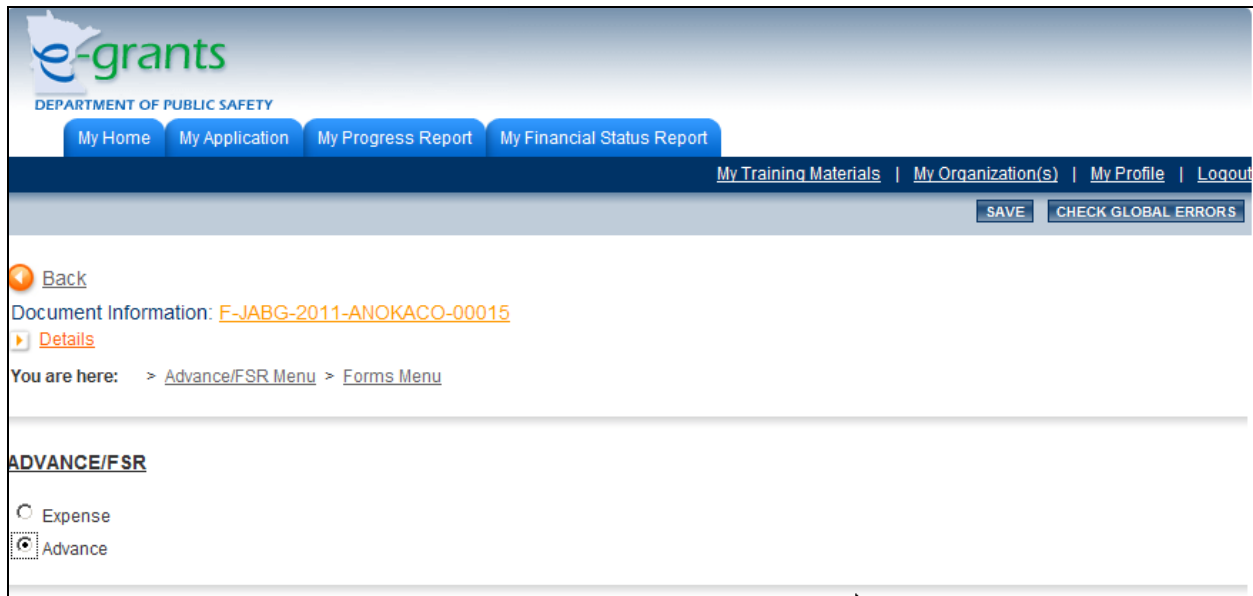
PAYMENT REQUEST CANCELLED

[APPLY STATUS](#)

Requesting an Advance

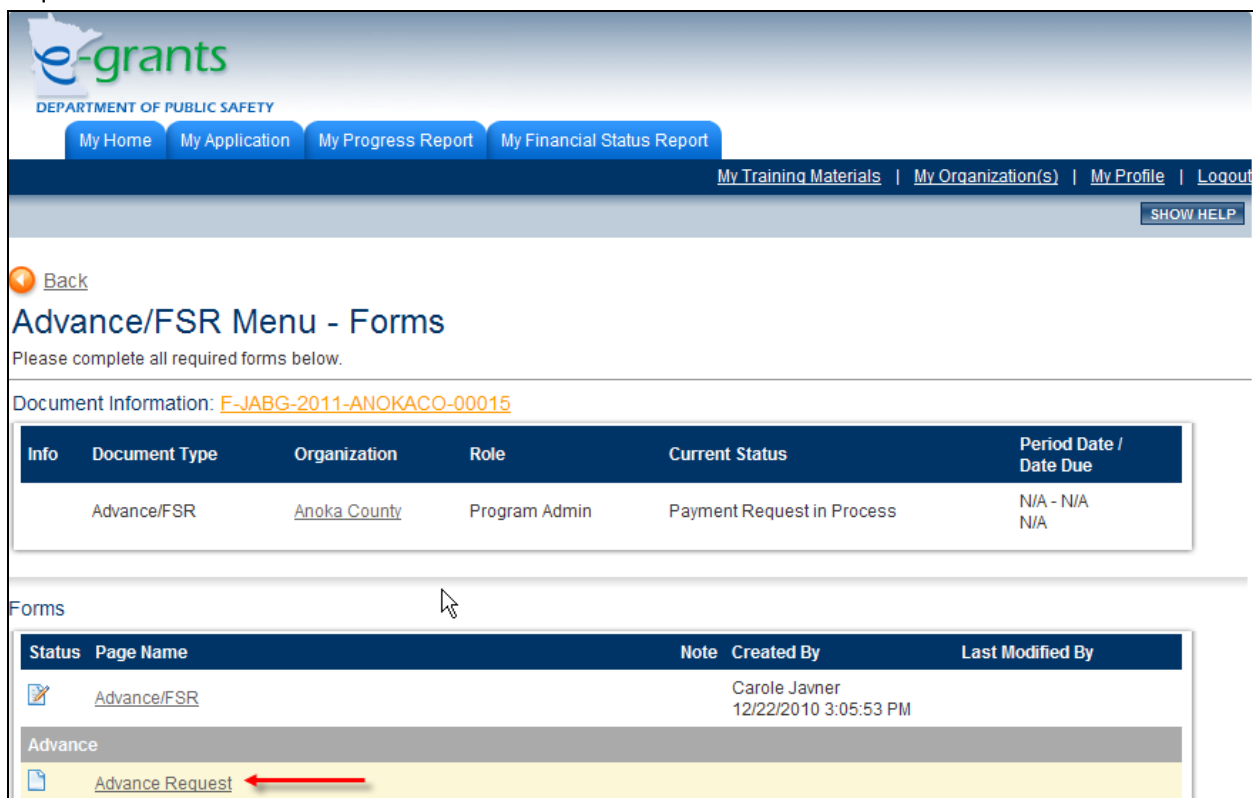
Step 1: Follow **Steps 1-4** for completing a Financial Status Report.

Step 2: Click the “Advance” button and save the page. After saving the page navigate back to the Forms Menu.



After accessing the Forms Menu you will notice that the Advance Request form is now available in the menu.

Step 3: Select the Advance Request form to begin filling out your advance request.



Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	N/A - N/A N/A

Status	Page Name	Note	Created By	Last Modified By
	Advance/FSR		Carole Javner	12/22/2010 3:05:53 PM

Advance
Advance Request

Step 4: Enter the Advance Request. You may also enter comments for your grant manager.

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Document Information: [F-JABG-2011-ANOKACO-00018](#)

Details

Program Component: Advance

Created By: Tonding, John on 2/3/2011 1:33:56 PM

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ADVANCE REQUEST

Grant Information		Report Information	
Grantee	Anoka County	Main Contact	John Tonding *
Grant #	A-JABG-2011-ANOKACO-00017	Request #	1
Award Amount	\$14,600.00	Status	Payment Request in Process
Term	10/01/2010 to 12/31/2010		

Comments to the Review Team from the Grantee

my comments

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Cash on Hand	Award Remaining	Available Advance	Advance Request
\$0.00	\$14,600.00	\$7,300.00	\$3,000.00

Step 5: Navigate to the Advance/FSR Menu.

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Document Information: [F-JABG-2011-ANOKACO-00018](#)

Details

Program Component: Advance

Created By: Tonding, John on 2/3/2011 1:33:56 PM

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ADVANCE REQUEST

Step 6: Click View Status Options


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Advance/FSR Menu

Please select from an option below. For detailed instruction about each option, select the **SHOW HELP** button.


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Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Program Admin	Payment Request in Process	01/01/2010 - N/A N/A

 **View, Edit and Complete Forms**


Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

 **Change the Status**

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.


[VIEW STATUS OPTIONS](#)

 **Access Management Tools**

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[VIEW MANAGEMENT TOOLS](#)

Step 7: Select APPLY STATUS Payment Request Submitted to submit your payment request.


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Advance/FSR Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [F-JABG-2011-ANOKACO-00018](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Advance/FSR	Anoka County	Authorized Representative	Payment Request in Process	N/A - N/A N/A

Possible Statuses

PAYMENT REQUEST SUBMITTED

[APPLY STATUS](#)

PAYMENT REQUEST CANCELLED

[APPLY STATUS](#)